

1000 Series

- 1001 Item not currently active**
- 1002 Item not currently active**
- 1003 MPSC-Wx – Income Eligibility Guidelines**
- 1004 Item not currently active**
- 1005 MPSC Programmatic and Narrative Reporting**

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Community Services Policy Manual	SUBJECT: INCOME ELIGIBILITY GUIDELINES MICHIGAN PUBLIC SERVICE COMMISSION (MPSC) ASSISTANCE FUNDS		EFFECTIVE DATE 01/01/07 ISSUE DATE 12/15/06

REFERENCES:

Michigan Public Service Commission (MPSC) Agreement

BACKGROUND:

The MPSC Agreement, Section II.E.1, states that an applicant will be considered eligible whose household income is at or below 200 percent of the poverty line as established by U.S. Department of Health and Human Services (HHS) and published in the Community Services Policy Manual.

POLICY:

AUTOMATIC INCOME ELIGIBILITY

Weatherization

A household is automatically income-eligible for MPSC weatherization program services if a household member has received Family Independence Program (FIP), Supplemental Security Income (SSI), or State Disability Assistance (SDA) benefits at any time during the twelve month period previous to the application date.

The agency must include documentation supporting the automatic income eligibility in the client file.

Client Education

Clients are automatically income-eligible for MPSC client education services in the following instances:

- The client's household has been determined eligible for U.S. Department of Energy (DOE), Low Income Home Energy Assistance Program (LIHEAP), or MPSC weatherization assistance within the previous 12 month period.
- The client's household has received emergency energy assistance from the agency or State Emergency Relief (SER) assistance from the Department of Human Services (DHS) within the previous 30-day period.
- A member of the client's household currently receives FIP, SSI, or SDA.
- The client's household currently receives any other form of agency or public assistance with an income threshold at or below 200% of federal poverty level. Proof of the client's receipt of such assistance and verification of the corresponding income threshold must be obtained.

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- For youth initiatives that partner with local schools, each school must be primarily low-income as determined by at least 60% of the students receiving a low-income program such as free or reduced lunch, or other methods as approved by DHS and the MPSC on a case by case basis.

The agency must include documentation supporting the automatic income eligibility, e.g., receipt of benefits in the previous 12 months, in the client file.

INCOME ELIGIBILITY DETERMINATION

The MPSC income maximum is 200 percent of poverty. Income refers to total annual cash receipts before taxes from all sources, with the exceptions noted below.

Income Guidelines

Refer to CSPM Item 208, Poverty Income Guidelines for the current poverty income guidelines.

Income Includes:

- Money, wages and salaries before any deductions.
- Net receipts from non-farm or farm self-employment (receipts from a person's own business or from an owned or rented farm after deductions for business or farm expenses).
- Regular payments from the Social Security Administration (gross benefits), railroad retirement, unemployment benefits, strike benefits from union funds, worker's compensation, veteran's payments, public assistance (including FIP, SSI and SDA), training stipends, alimony, child support, and military family allotments.
- Private pensions, government employee pensions (including military retirement pay), and regular insurance or annuity payments.
- Dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts, and net gambling or lottery winnings.
- Any lump sum payments received by Native Americans, such as from Casino income or tribal income.

Income Excludes:

- Capital gains.

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- Any assets drawn down as withdrawals from a bank, the sale of property, a house, or a car.
- One time payments from a welfare agency to a family or a person who is in temporary financial difficulty.
- Tax refunds, gifts, loans, lump sum inheritances, one time insurance payments, or compensation for injury.
- Non-cash benefits such as the employer paid or union paid portion of health insurance or other employee fringe benefits, food or housing received in lieu of wages, the value of food and fuel produced and consumed on farms, the imputed value of rent from owner-occupied non-farm or farm housing, and federal non-cash benefit programs such as Medicare (Medicare premiums are **not** excluded) Medicaid, food assistance benefits (including cash or stamps), school lunches, and housing assistance.
- College scholarships and grants.
- Foster care payments and adoption subsidies.
- Income earned through employment by a child who is age 18 and under, **and** attending school. (**Note:** Excluded “earned income” does **not** include program benefits such as Social Security, Supplemental Security Income, etc.; these **are** included in the total household income.)

INCOME COMPUTATIONS

Actual Annual Income

Determine the households’ **actual annual income** for the 12-month period preceding the date of application. This process should include working from year-to-date wage income documentation, current and prior monthly benefit documentation, W-2s or income tax returns for prior year income, and when necessary, self declarations.

See the attached sample form, **ATTACHMENT A**, for documenting income for 12 months.

Note:

- Recurring public benefits, such as Social Security, SSI, FIP, SDA, etc., or pension/retirement benefits, **may be multiplied by the relevant number of months received** by using documentation for one month’s benefit amount.
- W-2s and income tax returns may be used as **sole** income documentation only for applications taken from **January 1 through January 31** of the following year. For applications taken after January 31, W-2s and tax

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returns may only be used in combination with other current year income documentation to determine eligibility. In this instance, the W-2s and tax returns can provide a basis for determining/computing income for the relevant months in the prior calendar year. See the attached examples, **Attachment B**, for how to compute income using these source documents.

Annualized Income

Only in cases when it would place undue hardship on the client to document income for the preceding 12 months, the household's income may be **annualized** based on the 90 days or 13 weeks preceding the date of application. Income documentation for 90 days/13 weeks is annualized by multiplying it by four.

The computed annualized income figure **must fairly represent** the income received in the previous 12 months. If it is not a fair representation, the household's income should not be annualized and the client should self declare the missing income information to the best of his/her ability.

Note: An income source should **not** be annualized when there are periods in the past 12 months when the household member did not receive/earn income from that source.

INCOME DOCUMENTATION

Income must be thoroughly documented. The following items are acceptable documentation:

- Copies of paychecks or pay stubs.
- Written statements from employers.
- Letters, benefit statements or other documents from income sources (e.g. DHS, Social Security, VA).
- Unemployment Benefit check stubs.
- If self-employed, accounting and other business records showing net income.
- W-2s and income tax returns. (**Note:** W-2s and income tax returns will seldom be adequate by themselves since they usually report a period ending well in advance of the date of application. An exception may be made for the self-employed, since tax records are a convenient source of information about income; however, they should be used in conjunction with self-declaration.)
- Self-declaration of applicant, but only as a last resort.

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- Other documents the program operator has reason to believe will verify the projected income of the household member(s).

CLIENT FILE

Agencies must maintain a client file for all recipients of MPSC services. At a minimum, the file must include:

- A copy of the agency's client services application. The application must identify each member of the household as well as income sources and amounts for each member of the household being served. The client and the intake worker must sign the application.
- A copy of all documents used to determine income eligibility; including self declarations and documented phone conversations with public case workers.
- A copy of all documents used to support automatic income eligibility.
- All calculations for each income source for the prior 12 months as well as the total income for the client household.
- An explanation of the reason for using an annualized income computation (i.e. domestic violence, fire, etc.).
- The type and dollar value of the benefits provided.

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Community Services Policy Manual	SUBJECT Michigan Public Service Commission: PROGRAMMATIC REPORTING		EFFECTIVE DATE 05/28/07 ISSUE DATE 05/15/07

ISSUANCES AFFECTED:

REFERENCES Michigan Public Service Commission Request for Proposal
Michigan Public Service Commission Grantee Funding Agreement

BACKGROUND:

Reports will be required to fulfill Michigan Public Service Commission (MPSC) reporting requirements and to satisfy state and local management needs.

The MPSC Agreement, Section II, H requires the submission of programmatic reports.

POLICY:

The Grantee must use the DHS-441 Excel formatted report form to report weatherization activities and the DHS-442 Excel formatted report form to report client education activities.

The Grantee is required to complete and submit the MPSC Wx Activities Programmatic Report, DHS-441, and the MPSC Client Education Activities Programmatic Report, DHS-442, **each month** of the contract period. The first reports, covering the months of January through April, are due **May 31st**. All subsequent reports are due within 30 days of the end of the report month. **Exception:** The August report is due **September 15, 2007**.

The reports are Excel forms with tabs for each month of the report period. Both reports collect program year to date (PYTD) information. See Item 202 for the forms.

DHS-441- MPSC Wx Activities Programmatic Report - Instructions

Grantee ID section: The grantee will complete the boxes as indicated, the grantee name, contact person, contact phone number, contract number, and the total approved applications pending. The period covered is pre-filled.

Total Units Completed Section: The grantee will complete the total number of units completed to date. The grantee will indicate the period-to-date figures only. The worksheet will compute the year-to-date figure.

Measures Applied section: The grantee will complete the total number of measures applied by type as indicated. The grantee will indicate the period-to-date figures only. The worksheet will compute the year-to-date figures for each.

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Incidental Repairs/Replacements section: The grantee will complete the total number of repairs/replacements by type as indicated. The grantee will indicate the period-to-date figures only. The worksheet will compute the year-to-date figures for each.

Demographic Information: The grantee will complete the total amount of all household annual incomes for period-to-date. The worksheet will compute the year-to-date figure.

DHS-442- MPSC Client Education Activities Programmatic Report- Instructions

Grantee ID section: The grantee will complete the boxes as indicated, the grantee name, contact person, contact phone number, contract number, and the contact person's email address. The period covered is pre-filled.

Classes & Incentive Payments: The grantee will complete the total number for each of the questions listed for the report period. The worksheet will compute the year to date figures for each.

Energy Efficiency Kits and Items Distributed: The grantee will provide a description of the contents of all energy kits the agency distributes as well as a corresponding cost savings for each item in the kit if known. The grantee will indicate in number 1 the total number of kits distributed for the period. The worksheet will compute the year to date figures for each.

For agencies that are not providing energy efficiency kits, and/or for agencies that will be providing other energy efficiency materials, independently from kits, e.g. calendars, etc., the grantee will record this information in number 2. The grantee should list each item separately and indicate the total number of items distributed for the period. The worksheet will compute year to date figures.

School Activities section: The grantee will report energy efficiency activities using this section. The grantee will report the name of each school and the specific classroom(s) in each school, the number of participating students, a description of all energy efficiency related materials distributed and the number of items distributed for the period. The worksheet will compute the year to date figures.

Reports must be submitted electronically to Diane Holley at:

holleyd@michigan.gov